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A CAHNERS PUBLICATION

DATAMATION®

FOR CORPORATE COMPUTING PROFESSIONALS WORLDWIDE

OCTOBER 1, 1992

Ellen M. Hancock, vice president and general manager, networking systems, IBM

How IBM Is Rebuilding SNA

page 28

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FOR CORPORATE COMPUTING PROFESSIONALS WORLDWIDE

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IS organizations are facing one of the biggest networking decisions in decades: stay with SNA for distributed environments or chart a new course.

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IBM wants customers to embrace APPN for strategic internetworking. But many won't give up TCP/IP without a fight.

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Trudging Toward Recovery

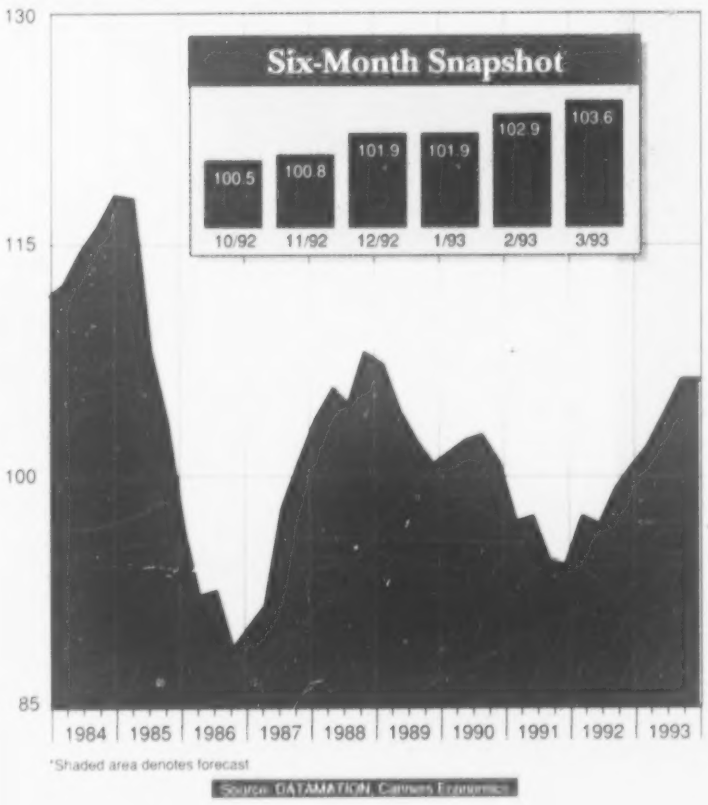
The recent mild upswing in the economy is producing a noticeable and positive effect on the information technology industry. After four straight quarters of flat growth or out-and-out painful losses, new orders for computers, peripherals and communications equipment increased 8.9% in the first period of this year and 12.4% in the second quarter from their levels a year ago. Our forecast for a 14% spurt in the third quarter is easily within range. The industry hasn't witnessed such quarterly growth in two-and-a-half years.

This resurgence in orders is pushing up DATAMATION's Information Systems Performance Indicator (ISPI). In June, the ISPI, which tracks the overall health and performance of the IT industry, hovered just below 100—the demarcation line between decline and growth. Cahners Economics estimates the ISPI will move to 100.5 in October, indicating that growth has begun.

The IT industry is now savvy and mature enough not to get euphoric over the latest jump in demand. The IS sector is still billing more than it's booking, so the climb out of the recessionary hole won't be an easy one. But we predict that the economic recovery will persevere, boosting the ISPI to 106.2 by this time next year.

By Madeline Franchi. For more information on Cahners Economics's forecasting services, including seminars, newsletters and database diskettes, call Dan Buchan at (617)-630-2105, send him a fax at (617)-630-2100 or write to him at Cahners Economics, 275 Washington Street, Newton, MA 02158.

The IS Performance Indicator



*Shaded area denotes forecast

Source: DATAMATION, Cahners Economics

	Last Month	Prev. Month	% Change	Year Ago	% Change
■ Information-Processing Equipment					
Shipments (SA, $ billions, June)	9.53	9.06	5.1	8.2	16.2
New Orders (SA, $ billions, June)	9.41	9.01	4.4	8.10	16.2
Unfilled Orders (SA, $ billions, June)	19.00	19.11	-0.6	21.97	-13.5
Inventory (SA, $ billions, April)	16.20	19.23	-15.8	16.66	-2.8
■ Computer Production Workers					
Employment (NSA, thousands, June)	242.3	244.1	-0.7	260.5	-7.0
Average Weekly Hours (monthly avg., June)	40.8	40.7	0.2	41.9	-2.6
■ Stock Index (July)					
S&P's Computer Systems Stock Price Index	153.8	150.3	2.3	164.6	-6.5
■ Contracts & Orders (May)					
New Plant & Equipment (SA, $ billions)	33.27	34.85	-4.5	31.14	6.8

SA = Seasonally Adjusted
NSA = Not Seasonally Adjusted

Source: U.S. Commerce Dept., Standard & Poor's